



ALAMEDA COUNTY
CONGESTION MANAGEMENT AGENCY

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April 20, 2005

**REQUEST FOR QUALIFICATIONS (RFQ)
FOR
COMMUNITY BASED TRANSPORTATION PLANS
IN ALAMEDA COUNTY**

Dear Consultant:

The Alameda County Congestion Management Agency (ACCMA) is seeking a statement of qualifications from qualified consulting firms to prepare one to three Community Based Transportation Plans (CBTPs) in Alameda County. The ACCMA desires to retain one or more consultants for up to a one-year duration to prepare the first CBTP, which has been funded by the Metropolitan Transportation Commission (MTC) in West Oakland. MTC has scheduled two more plans in East Oakland and Berkeley, which are pending funding. The submission of RFQs will place all applicants on an eligible list for West Oakland CBTP as well as the two additional plans that will be prepared in Alameda County subsequent to completion of the West Oakland CBTP.

If selected, consultants would hire one or more Community Based Organizations (CBOs) within the project area from a list provided by ACCMA. The CBOs, who would be included in the total project budget, would assist with the public outreach portion of the CBTP. MTC has stated that the budget for the West Oakland CBTP is \$60,000, including the compensation to the CBOs.

The attached Request for Qualifications describes the project, presents the requirements of the submittal, and outlines the criteria that will be used to evaluate the Statement of Qualifications. If you are interested in being considered to provide this service, please submit eight (8) copies of your organization's Statement of Qualifications to the ACCMA office **by 3:00 p.m. on Wednesday, May, 18, 2005**. A pre-submittal meeting will be held at the Alameda County Congestion Management Agency, 1333 Broadway, Suite 220, Oakland, CA 94612 on Thursday, May 5, 2005 at 10:00 a.m. Firms are encouraged to attend the pre-submittal meeting May 5th. The intent of the pre-submittal meeting is to respond to all questions regarding the project and ACCMA's requirements. Additional information on the Community Based Transportation Plan Project will not be provided after the pre-submittal meeting. Interviews, if necessary, are tentatively scheduled for May 24, 2005.

We look forward to receiving a submittal from your firm. If you have any questions regarding this request, please direct them to Diane Stark at 510/836-2560, extension 13.

**REQUEST FOR QUALIFICATIONS
For
COMMUNITY BASED TRANSPORTATION PLANS
IN ALAMEDA COUNTY**

by the

Alameda County Congestion Management Agency

RESPONSES DUE

3:00 p.m. Wednesday, May 18, 2005

Alameda County Congestion Management Agency
1333 Broadway, Suite 220
Oakland, CA 94612

**Request for Qualifications (RFQ – 005-008)
Community Based Transportation Plans
In Alameda County**

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ALAMEDA COUNTY CONGESTION MANAGEMENT AGENCY

**REQUEST FOR QUALIFICATIONS (RFQ)
for
Community Based Transportation Plans
In Alameda County**

I. Purpose

The Alameda County Congestion Management Agency (ACCMA) is seeking a statement of qualifications from qualified consulting firms to prepare one to three Community Based Transportation Plans (CBTPs) in Alameda County. The first plan has been funded by the Metropolitan Transportation Commission (MTC) for West Oakland. Two more plans are scheduled and pending funding in East Oakland and Berkeley. The West Oakland CBTP will be prepared in 2005-06. The submission of RFQs will place all applicants on an eligible list for West Oakland CBTP as well as the two additional plans that will be prepared in Alameda County subsequent to completion of the West Oakland CBTP.

The intent of the plans is to solicit community input to identify transportation gaps in low income areas in Alameda County that have been identified by MTC in their Lifeline Transportation Report, 2001 and to find solutions, cost estimates, and funding opportunities to meet those gaps. Once selected, it is expected that the consultant firm or firms would hire one or more CBOs familiar with the project areas to develop and implement the community outreach process. The firm will select one or more CBOs in the project from a list that will be provided by ACCMA. Compensation for the CBOs would be included in the consultant firm's project budget.

As part of the process, the team will identify relevant stakeholders in the project area and provide for a significant community outreach campaign to actively solicit community input to develop the community-based transportation plan. As necessary, the transportation consultants will also supplement the list of transportation solutions identified by the community to effectively address transportation gaps they have been identified, and provide cost estimates and funding opportunities to meet the transportation needs identified by the community.

The Alameda County Community Based Transportation Plans are three of several plans throughout the Bay Area that are to be based upon the findings identified in the Metropolitan Transportation Commission (MTC)'s Lifeline Transportation Network Report. The report identifies transportation needs in economically disadvantaged communities throughout the Bay Area, including West Oakland, East Oakland and Berkeley.

It is not necessary for interested consultants or CBOs to form a team prior to responding to this RFQ. ACCMA will provide the preferred consultant with a list of CBOs that can become part of an approved consultant team.

II. Background

The goal of MTC's Community-Based Planning Program is to advance the findings of two reports completed for the 2001 Regional Transportation Plan (RTP) update. The Lifeline Transportation Network Report (Lifeline) identified transit needs in economically disadvantaged communities throughout the San Francisco Bay Area, and recommended community-based transportation planning as a first step to address them. Likewise, the Environmental Justice Report for the 2001 RTP also identified the need for MTC to support local planning efforts in low-income communities throughout the region. To initiate the program, MTC adopted Community-based Transportation Planning (CBTP) program guidelines in 2002 to serve as a blueprint for implementation. Following the adoption of the guidelines, MTC launched a pilot program in five counties that was completed in 2004. Based on the positive results of the pilot, MTC will continue to implement community-based transportation planning in the remaining communities identified in the program guidelines, including West Oakland.

The CBTP program is a collaborative process involving residents of low-income and minority communities, community and faith-based organizations that provide services within these communities, transit operators, county congestion management agencies (CMAs) and MTC. Each planning process involves a significant community outreach component to engage the direct participation of residents. The outcome of the planning process is a community-based transportation plan that includes locally-identified transportation needs, as well as solutions to address them. Solutions may include expanding fixed-route transit, or other transportation services such as shuttles, bicycle options or auto-oriented alternatives. In some cases, new capital improvements such as bus stops, benches, shelters or other enhanced amenities may be identified. Funding opportunities are explored to support the solutions, and an outline for an action plan to implement them is developed.

Following the completion of the plans, results are forwarded to applicable transit agencies, CMAs, MTC or other relevant boards for consideration in future planning, funding and implementation discussions or submittals such as countywide expenditure plans, Regional Transportation Plan (RTP) updates, etc.

III. Scope of Work

The services to be performed by the selected consultant team shall consist of services requested by the Project Manager or a designated representative, including, but not limited to, the following:

Task 1: Project Budget and Schedule

ACCMA will engage a consultant team, consisting of a transportation planning consultant and one or more CBOs, who shall prepare a budget and schedule to complete the tasks associated with this planning project. ACCMA will submit the project budget and schedule to MTC for its approval.

Deliverable #1a: Draft Project Budget and Schedule

Deliverable #1b: Final Project Budget and Schedule

The selected Consultant team shall perform the following Project activities:

Task 2 – Initiate Collaborative Planning Process

Identify community or faith-based organizations or agencies that represent the interests of residents within the project area to participate in the planning process. CBOs participating in the project should support and reflect the ethnic and demographic makeup of the project area. In addition to project area CBOs, the Stakeholder Committee will likely include residents, local business representatives, representatives from local schools, public officials and/or staff, MTC, and County agency staff, as appropriate.

A Technical Advisory Committee (TAC) will also be facilitated for the project, and will consist of, at a minimum, staff representatives from ACCMA, County Social Services, AC Transit, BART, ACCMA and MTC so as to:

- 1) Review and finalize work products prior to presentation to the Stakeholder Committee
- 2) Monitor the schedule and completion of tasks and work products.

Deliverable #2: Memorandum summarizing participants on the Stakeholder Committee, including identification of CBOs representing all relevant groups to be consulted during the outreach process, and the TAC.

III. Task 3: Summarize transit gaps in West Oakland

Review and confirm boundaries of the community based on the Lifeline Transportation Network Report (Lifeline) and input from the community. Provide a description of the project area, including residential demographics (auto ownership, race/ethnicity, gender, age, income status, etc.), information related to the existing transportation network, and information regarding recent and planned or proposed economic or housing development in the area. Summarize the transportation gaps identified in the Lifeline Report, as well as other relevant plans that identify transportation gaps in the project area.

Deliverable #3: Memorandum describing 1) the project area (demographics, existing transportation network and recent and proposed or planned development) and 2) transportation gaps from the Lifeline Report and other relevant plans covering the project area. A map of the project area will be included with the Memorandum.

IV. Task 4: Establish community outreach strategy

Based on the transportation gaps identified in Task 3, meet with stakeholders to confirm outreach objectives and determine appropriate outreach strategies to effectively obtain input from community members. Strategies may include, but are not limited to, hosting project-specific public meetings and workshops, attending regularly scheduled CBO meetings to present project information and solicit feedback, attending public events based in the neighborhoods, conducting focus groups and interviews, distributing surveys, and establishing project-related telephone hotlines/websites. More than one strategy may be implemented to effectively reach residents within the communities. Review proposed strategies with stakeholders and facilitate consensus on proposed approach. Develop schedule to execute outreach plan.

Deliverable #4: Memorandum #4 detailing any additional CBOs to be consulted during the outreach process not previously identified in Task 2, outreach strategies and measures to determine participation (i.e. number of meetings held, number of attendees, number of returned surveys, etc.), and a timeline for outreach execution and completion.

V. Task 5: Conduct community outreach to prioritize community-identified transportation gaps. Propose solutions to close gaps.

Execute community outreach campaign utilizing strategies approved in Task 4. Facilitate discussions with the goal of reaching consensus to prioritize the gaps identified in Task 3 and any additional gaps identified by the community. Gather input from community members on solutions to mitigate gaps. Solutions may include fixed-route options, shuttle services, guaranteed ride home programs, auto-oriented options, bicycle alternatives, or in some cases, capital enhancements such as bus shelters, benches or other amenities. As needed, provide information about solutions to address community-identified needs that the community may not be familiar with, such as car sharing, or strategies that may be successful in other communities. Establish priorities, such as high, medium or low for gap-mitigation solutions.

Deliverable #5: Memorandum summarizing 1) outreach process (strategies, level of community participation) 2) list of community-prioritized gaps and 3) description of proposed solutions for filling the gaps. Provide a list containing names and mailing addresses of CBOs and residents that participated in the outreach process for use in future transportation-related outreach efforts.

Task 6: Evaluate feasibility of implementing proposed solutions and recommend implementation strategies

In conjunction with the TAC, establish criteria for evaluating the feasibility of proposed solutions (i.e. cost effectiveness, potential funding availability, reasonableness of implementation schedule, etc.). Facilitate consensus among stakeholders on the evaluation criteria. Review potential solutions based on how well they meet the agreed-upon criteria.

Document solutions that do not meet the criteria, indicating why they will not advance for further analysis. Evaluate the implementation feasibility of the proposed viable solutions including cost estimates, lead agency, potential funding sources, timelines, etc., and include any operational, institutional or funding constraints (both public and private resources) that need to be addressed to ensure successful implementation. Educate stakeholders and the community about how new and innovative solutions could meet the transportation needs they have identified.

Deliverable #6: Memorandum summarizing the feasibility of each proposed solution based on agreed-upon criteria. Recommend implementation strategies based on these factors.

Task 7: Prepare Final Community-based Transportation Plan

Prepare final Community-based Transportation Plan.

Deliverable #7: The Final Report will consolidate all technical memorandums and maps into one draft final report. Comments received on all technical memorandums and draft reports will be incorporated. The consultant will prepare 20 copies each of the draft and 50 copies of the final report. One unbound original and electronic copy of the final report will also be provided to the ACCMA. The final Community-based Transportation Plan will contain the following elements:

- Planning area description and demographics
- Summary of the community outreach process including all CBOs and outreach strategies involved as well as the outreach results (i.e. number/type of events, attendance, number of returned surveys, etc.)
- List of amendments to the Lifeline Transit Network as appropriate
- List of community-prioritized transportation gaps
- List of feasible, community-supported solutions to close gaps
- Assessment of operational, institutional and funding constraints needed to be addressed in order to ensure successful implementation
- Cost estimates for each proposed solution
- Outline for implementation action plan, including agency responsibilities
- List of potential public and private funding sources to support solution implementation.

Task 8: Present Final Community-based Transportation Plan Results

Present the results of the final community-based transportation plan to stakeholders, transit agencies, ACCMA, and others, up to a maximum of seven presentations.

Preliminary Project Schedule

Task #	Milestone/Deliverable	Date of Completion
1	Memorandum #1: Memorandum summarizing Lifeline transit	One month

	gaps in comparison to the baseline conditions for the neighborhoods located in the project area.	
2	Memorandum #2: Memorandum outlining community outreach strategies, CBOs to be consulted during the process and measures to determine community participation.	One month
3	Memorandum #3: Memorandum summarizing 1) outreach strategies utilized and levels of community participation 2) list of community-prioritized gaps and 3) list of proposed solutions, fixed route or other with associated implementation costs.	5 months
4	Memorandum #4: Memorandum summarizing solution feasibility, including cost estimates, lead agencies, potential funding sources, timelines as well as any additional information relevant to solution implementation.	7 months
5	Deliverable #5: Community-based transportation plan	9 months
6	Presentation of results	TBD

* First date begins from Notice to Proceed. The following timeframes build from the previous task.

IV. SCHEDULE

The following is a tentative project schedule and milestone requirement for the project.

Release RFQ	Wednesday, April 20, 2005
Pre-Submittal Meeting*	Thursday, May 5, 2005, 10:00 a.m.
Statement of Qualifications Due	May 18 2005, 3 p.m. at ACCMA offices in Oakland
Interviews	Tentative Date: May 24, 2005
Consultant and CBO Selection	Week of May 30, 2005
Draft Final Report	March 2006

*The intent of the pre-submittal meeting is to respond to all questions regarding the study and ACCMA requirements. Additional information on the Community Based Transportation Plan will not be provided after the pre-submittal meeting.

V. SUBMITTAL CONTENTS

Your submittal must be limited to 30 pages and must include:

1. A *transmittal letter* signed by an official authorized to bind the consultant.
2. A *title page* showing the RFQ subject, name of the proposer's firm including subconsultants (if any), local address, name and telephone number of contact person, and the date.

3. *Table of Contents*

4. *Overview and Summary.* This section should clearly convey the consultant's understanding of the nature and purpose of the work and the general approach to be taken, including the method for selecting the CBOs from ACCMA's list.

5. *Management Approach.* This section should describe the consultant's approach to management of the work. The consultant shall describe the role of the CBOs, with a description of the CBOs specific responsibilities. If subconsultants are to be used, provide similar information for each subconsultant. This section should discuss the consultant's organization for this project, how the work assignments are structured, and the staffing. The staffing discussion should include the names and a brief summary of the qualifications of the key personnel involved in each aspect of the project. The current work commitment of the Project Manager and key staff should also be presented.

6. *Personnel Qualifications.* This section should include a summary of the resumes of the team members that would be assigned to the project. Specific relevant experience should be highlighted for each team member. This should include previous work with Community Based Organizations and familiarity with one or more of the three project areas.

8. *Qualifications of the Firm.* This section should provide a short description of previous projects, which significantly relate to the consultant's qualifications for this project. This should include previous work with Community Based Organizations and familiarity with one or more of the three project areas. This description should identify the role, if any, of the key personnel assigned to conduct the project. Provide a list of five former or current clients for whom the firm has performed services similar to those described in this RFQ, along with names and telephone numbers of persons who may be contacted as references and the consultant team member who performed the work. If subconsultants are to be used, provide similar information for each subconsultant.

VI. SELECTION PROCESS

A panel selected by the ACCMA will review all written statements of qualifications submitted on time. The panel will evaluate the submittals and make a selection based on the following criteria:

- Relevant experience of the key personnel assigned to the project
- Qualifications of the Firm, including relevant experience with projects of this type
- Experience with Community Based Organizations
- Project understanding and approach
- Understanding of the Study's Purpose of the Community Based Transportation Plan
- Ability to Articulate Recommendations to Decision-Makers and Staff

Submittal Evaluation Factors

The successful submittal will include a strong community outreach component as well as a technical transportation-planning element. A selection panel will evaluate submittals based on the following criteria, all of which are approximately equal in importance:

1. Consensus building, facilitation, and organizational skills in arranging for and conducting community outreach. Demonstrated knowledge of and experience in conducting various outreach techniques (i.e. surveys, focus groups, hosting public meetings, etc.). Ability to synthesize community input and compile results into a final transportation plan. Demonstrated ability to work with a diverse range of organizations and populations. (Note: the successful team must work in conjunction with a variety of stakeholders including community based organizations representing the interests of the community, community residents, transit operators, the Alameda County Congestion Management Agency or its designee and MTC).
2. Demonstrated knowledge and experience working in the project area and familiarity with transportation issues specific to the neighborhoods located therein.
3. Experience working with Community Based Organizations.
4. Familiarity with the project areas.
5. Technical transportation planning skills to assess transit gaps and identify appropriate broad-based solutions. Understanding of the operational and financial constraints faced by public transit operators and the ability to provide cost estimates associated with the implementation of proposed solutions, whether through the provision of fixed-route services or other approaches.
6. Understanding of the project requirements and the intent of the community-based transportation planning program. Suitability of proposed approach.
7. Cost-effective allocation of resources.
8. Experience in planning, facilitating or delivering similar projects.
9. Effective communication skills, both oral and written.

The ACCMA reserves the right to select a consultant based solely on written submittals and not convene oral interviews. If oral interviews are necessary, the selected proposers will be requested to make a formal presentation. The panel will recommend one consultant from those interviewed. The recommendation will then be forwarded to the Executive Director for action.

VII. PUBLIC DOMAIN REQUIREMENT

Title to the study products including all copies and derivative works prepared by the consultant shall be in and remain with the ACCMA. The consultant will assign ownership of all copies and derivative works to the ACCMA with a perpetual royalty-free license to use, reproduce, sublicense, and modify such modifications, additions, or updates.

VIII. SUBMITTAL DEADLINE

An original and eight (8) copies of your statement of qualifications are due at the offices of the ACCMA by 3:00 p.m. on May 18, 2005. They should be sent to the attention of:

Diane Stark
Senior Transportation Planner
Alameda County Congestion Management Agency
1333 Broadway, Suite 220
Oakland, CA 94612

Questions regarding this project should be directed to Diane Stark at (510) 836-2560 ext. 13. Additional information on the Community Based Transportation Plan will not be provided after the pre-submittal meeting.

IX. GENERAL CONDITIONS

A. Limitations

This RFQ does not commit the ACCMA to award a contract or to pay any costs incurred in the preparation of a submittal in response to this RFQ.

B. Award

The selected consultant team will be required to participate in negotiations regarding price, technical, or other elements of the work required for the project. ACCMA is under no obligation to enter into a contract with any consultant that responds to this RFQ.

C. Contract

A sample contract is attached to this RFQ. It is expected that the terms of the contract will be acceptable to the consultant.

D. Levine Act

The selected consultant team will be required to disclose on the record any contribution of \$250.00 or more which they have made to an ACCMA Board member within the twelve-month period preceding submission of the RFQ. This applies to your company, any member of your team, any agents for you or other team members and to the major shareholders of any closed corporation, which is part of your team. If you have made a contribution which needs to be disclosed, you must provide written notice of the date, amount and receipt of the contribution(s) in writing to the ACCMA Executive Director, Dennis Fay. This information will need to be provided before the ACCMA can approve any contract.

G. Other

The selected consultant team will be subject to all applicable provisions of the interagency funding agreement between the MTC and ACCMA. Copies of the agreement will be furnished upon request.

X. APPENDICES

A. Sample Contract